

ATTACHMENT #1

STATEMENT OF WORK

**Retirement Planning Training
RFQ: N00244-16-T-0018
N6588816RC60034**

1. SCOPE

- 1.1. This Statement of Work (SOW) identifies necessary retirement training planning for the Fleet Readiness Center Southwest (FRCSW), Total Force Strategy & Management Department, Code 7.3.1, Bldg. 5, P.O. Box 357058, San Diego, CA 92135-7058.
- 1.2. The services requested within this SOW are to provide training to help our employees prepare for retirement and financial planning. The training focuses on ways FRCSW can work with their employees to discuss retirement options, as well as, provide information to employees in order for them to understand, use, and integrate into making educated decisions regarding the appropriate retirement system—the Federal Employees Retirement System (FERS) or the Civilian Service Retirement System (CSRS). The course will provide FRCSW employees with a comprehensive knowledge of basic retirement benefits and options; information covering group health and life insurance, survivor benefit plan, and the Thrift Savings Plan (TSP), etc.
- 1.3. The primary period of performance (POP) for the requested services is a base year period and two one year options. (The actual dates will be specified upon award)

2. REQUIREMENTS

- 2.1 The Government's minimum requirements is for an individual who is knowledgeable in Federal Retirement Systems, and can provide in-depth expertise in the two retirement systems.

The minimum requirement for experience is three (3) years successfully teaching the FERS and CSRS subject matter and three (3) years as a professional financial planner.

Contractor's proposing shall provide a professional work experience summary for each instructor that would be providing the training. The summary shall reflect the presenter's background and prior experience in teaching retirement classes to DoD employees covering both the FERS and CSRS retirement programs and financial planning.

The Contractor's proposal shall include a thorough description narrative in their own terms of the training objectives identified in 2.3 as an example of the course training objectives. The Contractor shall also provide an outline or a student guide of the Retirement Planning course objectives identified in 2.3.

Specific documentation details will be outlined under FAR 52.212-2 Evaluation of Commercial Items.

After contract award if at any time the contractor has to substitute presenters, a similar summary shall be submitted to the Contracting Officer or designated representative, for approval.

Note:

The contractor is cautioned to not provide statement such as, "the PWS is understood", or "the contractor shall comply with all aspects of the PWS". A contractor's proposal shall address in their own prepared narrative how they will teach the training objectives. The narrative for each training objective shall be no longer than one page.

2.3 At the end of these sessions, the training objectives listed below will be considered complete and thorough to meet the Navy's goal:

- The Retirement Process
- How to calculate the retirement benefit
- CSRS and/or FERS Annuity Eligibility and Creditable Service
- Provide an understanding of how much income will come from each part of the FERS or CSRS retirement systems and how employees should expect to be able to use.
- Understand timeframes for retirement eligibility and the impact time has on benefits.
- Basic Financial obligations during retirement
- Understand how to determine "take home pay".
- How to manage benefits and maximize tax and other savings and contributions to the TSP.
- Developing financial and investment strategies.
- The Thrift Savings Program
- Understanding Social Security
- Understanding the Federal Employee's Group Life Insurance (FGLI)
- The Federal Employee Health Benefit plan (FEHB)
- Federal Long Term Care Insurance Program
- Overview of Medicare
- Flexible Spending Accounts (FSA)

2.4 The Contractor shall provide a one-day training course in Retirement Planning Training according to paragraph 2.0 above. The contractor shall provide a one-day training course for each of the Federal Retirement Systems—CSRS and FERS.

2.5 The Contractor shall provide all personnel, materials, and other items and non-personal services necessary to perform Retirement Planning Training for up to 30 participants per each one day session as defined in this Performance Work Statement except for those items specified as government furnished property and services.

2.6 The Contractor shall conduct an estimated number of classes for a total of fifteen (15) training classes per year. Classes will be at two locations Naval Air Station Coronado, San Diego, CA and Naval Base Lemoore, with a maximum of two (2) classes of the fifteen (15) at Naval Air Station, Lemoore, CA.

2.7 The Contractor shall provide one-day training sessions for a total of no more than seven hours each session; accommodate from 25-30 people per session; and conduct training from 0700 –1430 hours (PST), Monday through Friday (excluding federal holidays).

2.8 The Contractor will provide training materials needed to present training and any handouts for students.

2.9 The Career Development Office shall verify and initial each sign-in/roster sheet at the end of the day for each class session; issuing a Certificate of Completion to each attendee. The Contractor will review and sign each sign-in/roster sheet to verify the number of attendees. The Career Development Office will not furnish a copy of the employee sign-in roster to the contractor.

2.10 The deliverables expected are training classes for retirement options and training materials/handout(s).

2.11 The actual date for the classes will be determined by the Government and established under each delivery order issued. The requirement for classes during each period performance will fluctuate and orders for classes will be issued based upon the Government requirements as they emerge. As the Government determines the need for a class the contractor shall be notified and then a delivery order

for the class shall be placed against the basic contract. The establish class date will be confirmed with the Contractor no later than 15 days prior to the commencement of the class session(s).

2.12 Class cancellation: Provided the Government notifies the Contractor within a 10 day timeframe of a cancellation to a class, there will be no associated termination costs applied. If the Government does not provide a 10 day notification, the contractor may apply standard commercial cancellation charges, if such cancellation charges are applicable. Quotations submitted by any interested contractors shall provide in detail their standard commercial cancellation charges if applicable.

3.0 TRAVEL

3.1 The Contractor shall be required to travel in support of these requirements. The Contractor shall be responsible for conducting Training at the two required Naval Air Station locations (Coronado and Lemoore).

4.0 GOVERNMENT FURNISHED FACILITIES/EQUIPMENT

4.1 The Government will furnish or make available to the Contractor the use of Government-owned or operated facilities and equipment such as an overhead projector.

5.0 BASE ACCESS

5.1 The Contractor shall provide the Designated Government Representative (DGR) with a completed copy of the SECNAV Form 5512/1 requiring the information below for each person requiring base access in order to facilitate the vetting process required at least ten (10) business days in advance of the scheduled site visit.

5.2 Upon award, the contractor shall submit to Fleet Readiness Center Southwest (FRCSW), Security Department, Building 94-1, Code 6.5.2, PO Box 357058, NAS North Island, San Diego, CA 92135-7058, a visit request, with a copy to the Designated Government Representative (DGR). The request shall include:

Full Name (first, middle, last)
Date of Birth
Place of Birth
Country of Citizenship
Full Social Security Number
Vehicle License Plate Number, Make, Model and Year
Awarded contract number and contract POP

5.3 Upon arrival, all personnel will be required to check-in at the Visitor Control Center (Building 680), which is located near the Main Gate to Naval Base Coronado (NBC), NAS North Island, San Diego, CA. Following receipt of a clearance, personnel will then be required to coordinate with the DGR and obtain visitor badges through the FRCSW Quarterdeck, located in Building 94.

6.0 DESIGNATED GOVERNMENT PERSONNEL

6.1 DGR/POC – Vonne Smiley; (619) 545-1579; email: vonne.smiley@navy.mil

6.2 Technical Points of Contact (TPOC) – Vonne Smiley, (619) 545-1579, email: vonne.smiley@navy.mil and Peter Muse, (619) 767-7223, email: peter.muse1@navy.mil

7.0 INVOICING/PAYMENT

7.1 Invoices for services rendered under this contract shall be submitted electronically through Wide Area Workflow (WAWF):

WAWF Inspector: TPOC, Vonne Smiley, (619) 545-1579, email: vonne.smiley@navy.mil

WAWF Acceptor: William Fields, (619) 545-5502, email: william.k.fields@navy.mil

Alternate: Angela Ingram-Smith, (619) 545-6020, email: angela.ingramsmith@navy.mil

WAWF Certifier: Paula Stauffer, (619) 545-3423, email:

7.2 Officials:

- Pay Official DoDAAC – N68732
- Inspect by - Vonne Smiley, (619) 545-1579, vonne.smiley@navy.mil / N65888
- Approver/Acceptor/LPO DoDAAC – N65888
- Acceptor – William Fields, (619) 545-5502, william.k.fields@navy.mil
- Certifier – Paula Stauffer: paula.stauffer@navy.mil